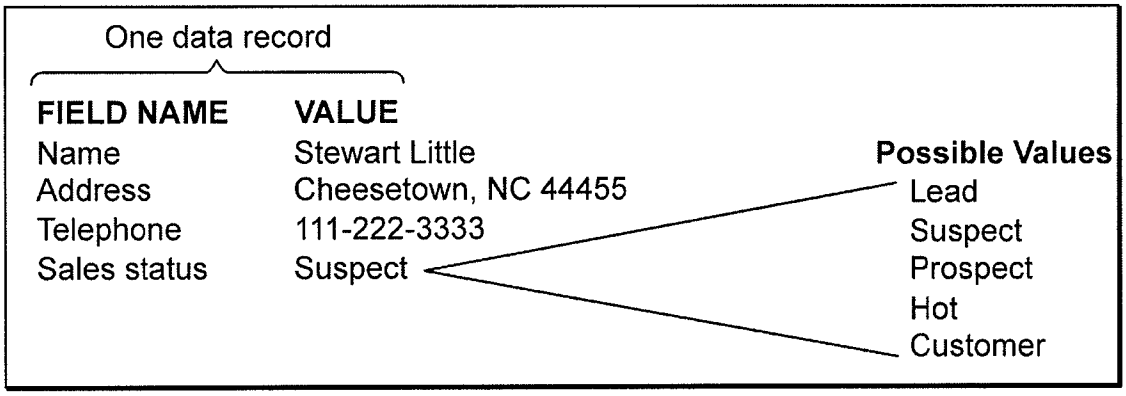


PRIOR ART

FIG. 1

Name	Source of lead	Enjoys Sports	Enjoys Ballet	Smokes Cigars	Sales Cycle Status
Alice	Web	Yes	Yes	Yes	Suspect
Bobby	Call in	No	No	No	Lead
Joe	Direct Mail	Yes	No	No	Suspect
John	Web	No	Yes	Yes	Prospect
Mark	Direct Mail	No	No	Yes	Lead
Mary	Call in	Yes	No	Yes	Lead
Michael	Call in	No	Yes	No	Lead
Paul	Web	Yes	No	No	Lead
Peter	Web	No	Yes	Yes	Prospect
Raymond	Direct Mail	Yes	Yes	No	Hot Prospect
Rodney	Web	Yes	No	Yes	Lead
Samantha	Call in	Yes	No	No	Prospect
Sylvia	Call in	Yes	No	No	Suspect
Tracy	Web	No	Yes	No	Hot Prospect
Trent	Web	No	No	No	Suspect

PRIOR ART

FIG. 2

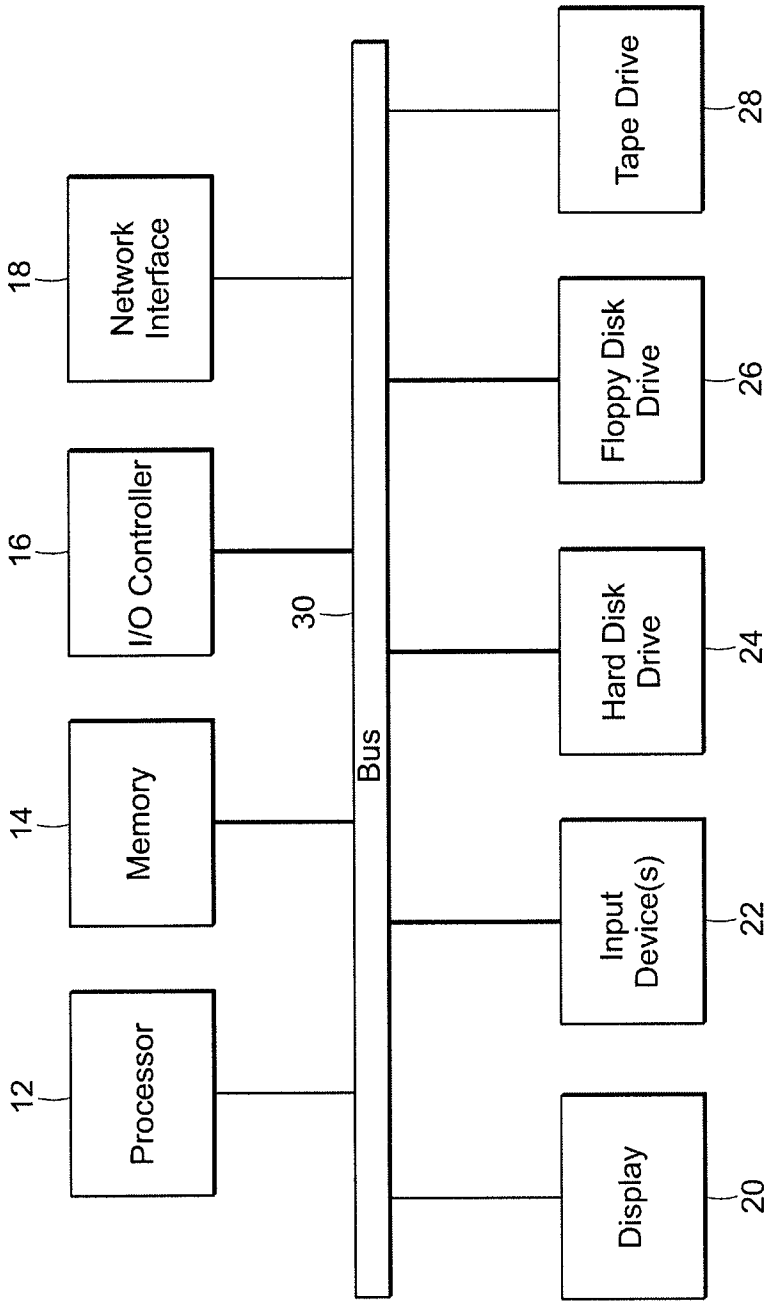

Processor
12
Memory
14
I/O Controller
16
Network Interface
18
Bus
30
Display
20
Input Device(s)
22
Hard Disk Drive
24
Floppy Disk Drive
26
Tape Drive
28
10

FIG. 3

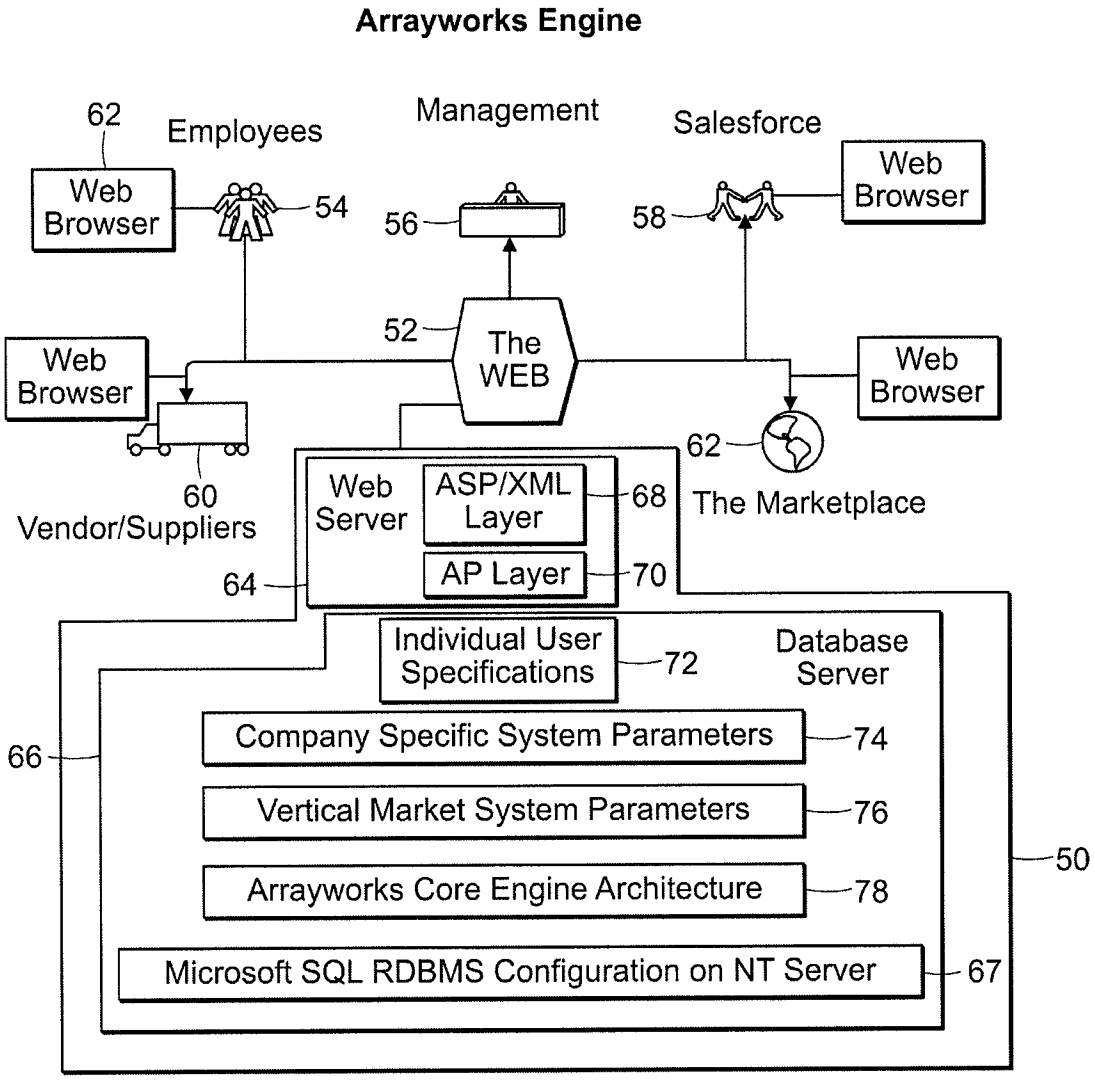

Arrayworks Engine
62
Employees
Management
Salesforce
Web Browser
54
56
58
Web Browser
52
The WEB
Web Browser
Web Browser
62
60
Vendor/Suppliers
Web Server
ASP/XML Layer
68
The Marketplace
AP Layer
70
64
Individual User Specifications
72
Database Server
66
Company Specific System Parameters
74
Vertical Market System Parameters
76
50
Arrayworks Core Engine Architecture
78
Microsoft SQL RDBMS Configuration on NT Server
67

FIG. 4

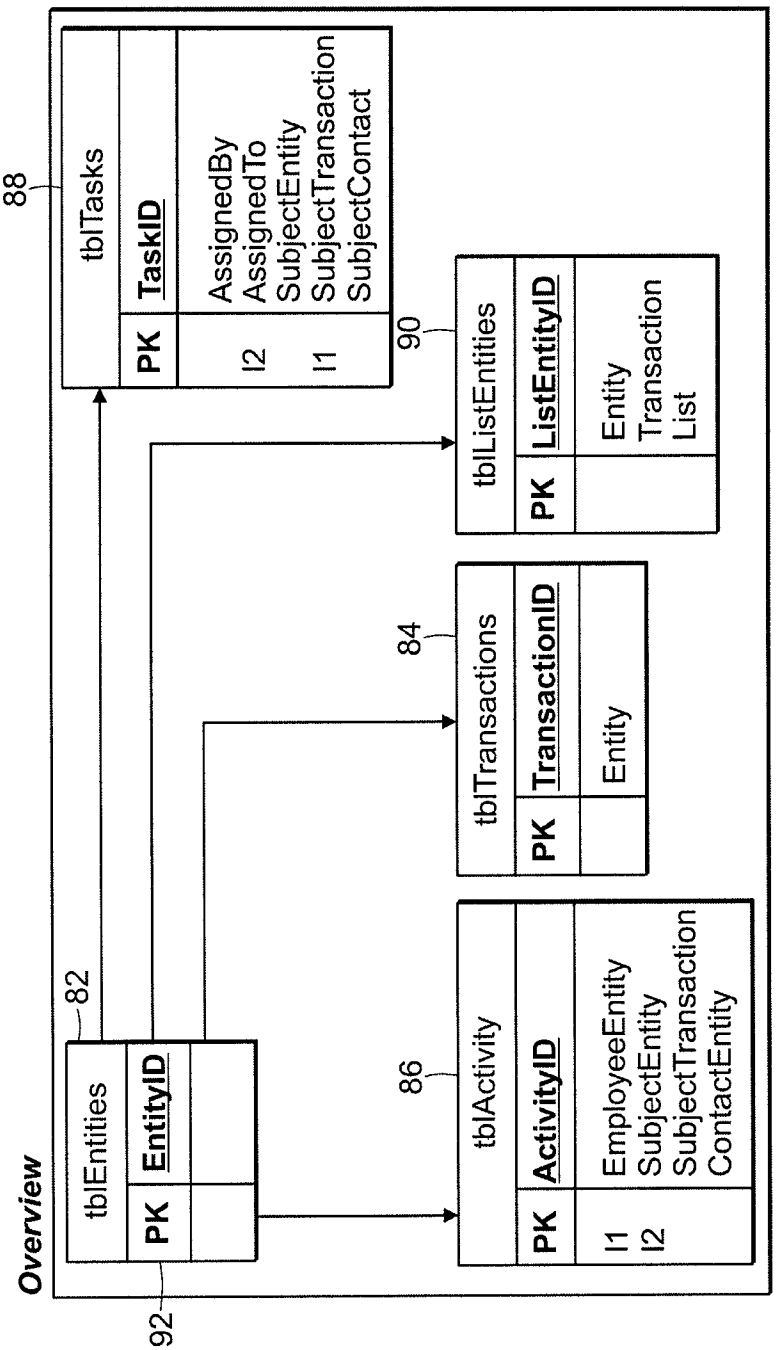

Overview
tblEntities
PK
EntityID
92
82
88
tblTasks
PK
TaskID
I2
I1
AssignedBy
AssignedTo
SubjectEntity
SubjectTransaction
SubjectContact
90
tblListEntities
PK
ListEntityID
Entity
Transaction
List
84
tblTransactions
PK
TransactionID
Entity
86
tblActivity
PK
ActivityID
I1
I2
EmployeeEntity
SubjectEntity
SubjectTransaction
ContactEntity
80

FIG. 5

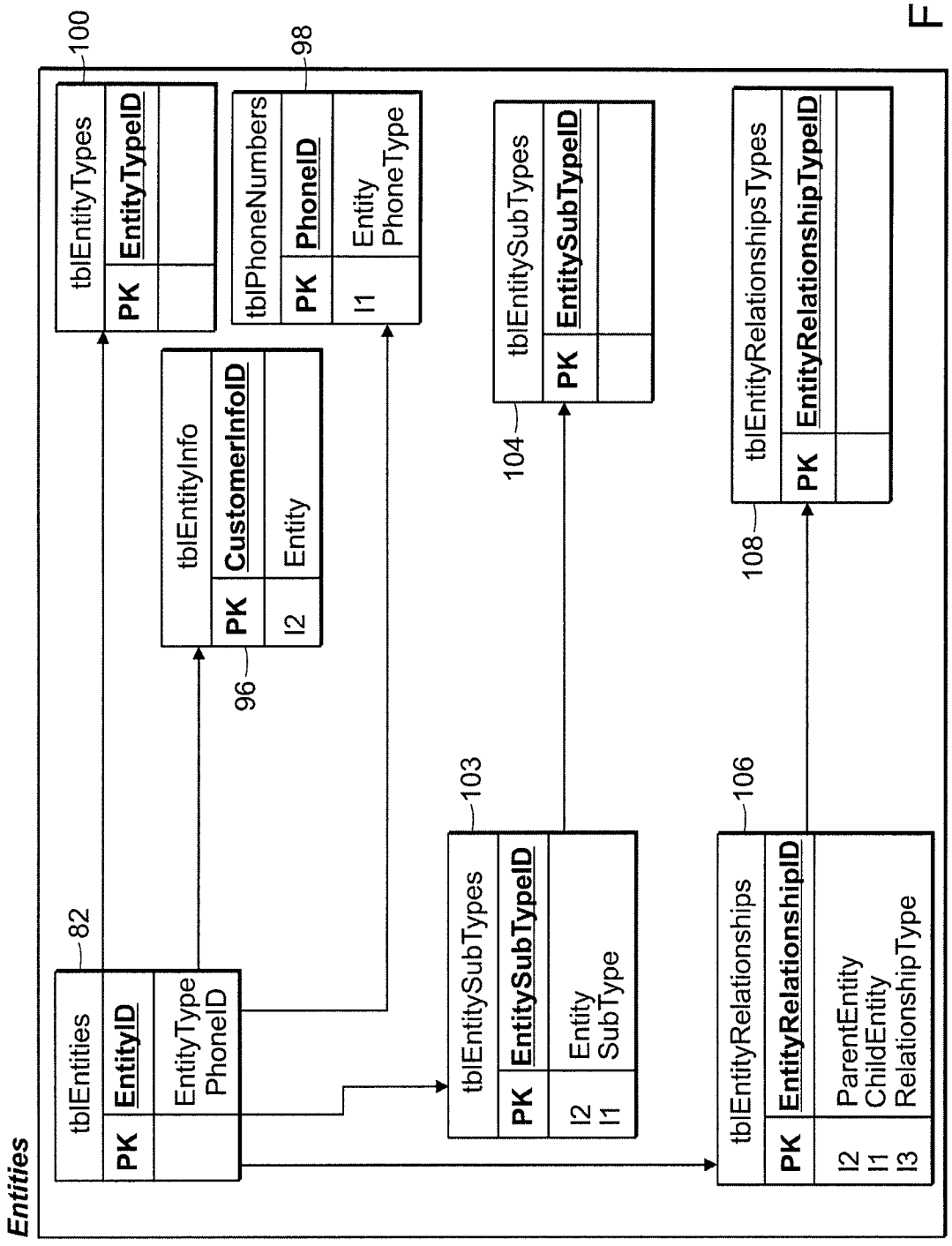

Entities
tblEntities
82
PK
EntityID
EntityType
PhoneID
tblEntityTypes
100
PK
EntityTypeID
tblEntityInfo
PK
CustomerInfoID
I2
Entity
96
tblPhoneNumbers
98
PK
PhoneID
I1
Entity
PhoneType
tblEntitySubTypes
104
PK
EntitySubTypeID
tblEntitySubTypes
103
PK
EntitySubTypeID
I2
I1
Entity
SubType
tblEntityRelationships
106
PK
EntityRelationshipID
I2
I1
I3
ParentEntity
ChildEntity
RelationshipType
tblEntityRelationshipsTypes
108
PK
EntityRelationshipTypeID

FIG. 6

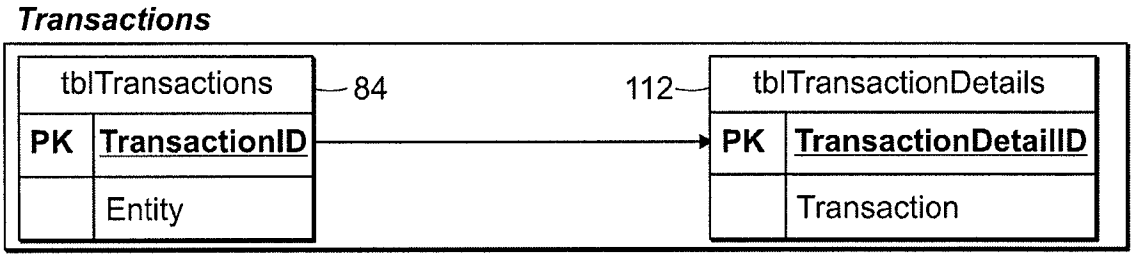

Transactions
tblTransactions
84
PK
TransactionID
Entity
112
tblTransactionDetails
PK
TransactionDetailID
Transaction

FIG. 7

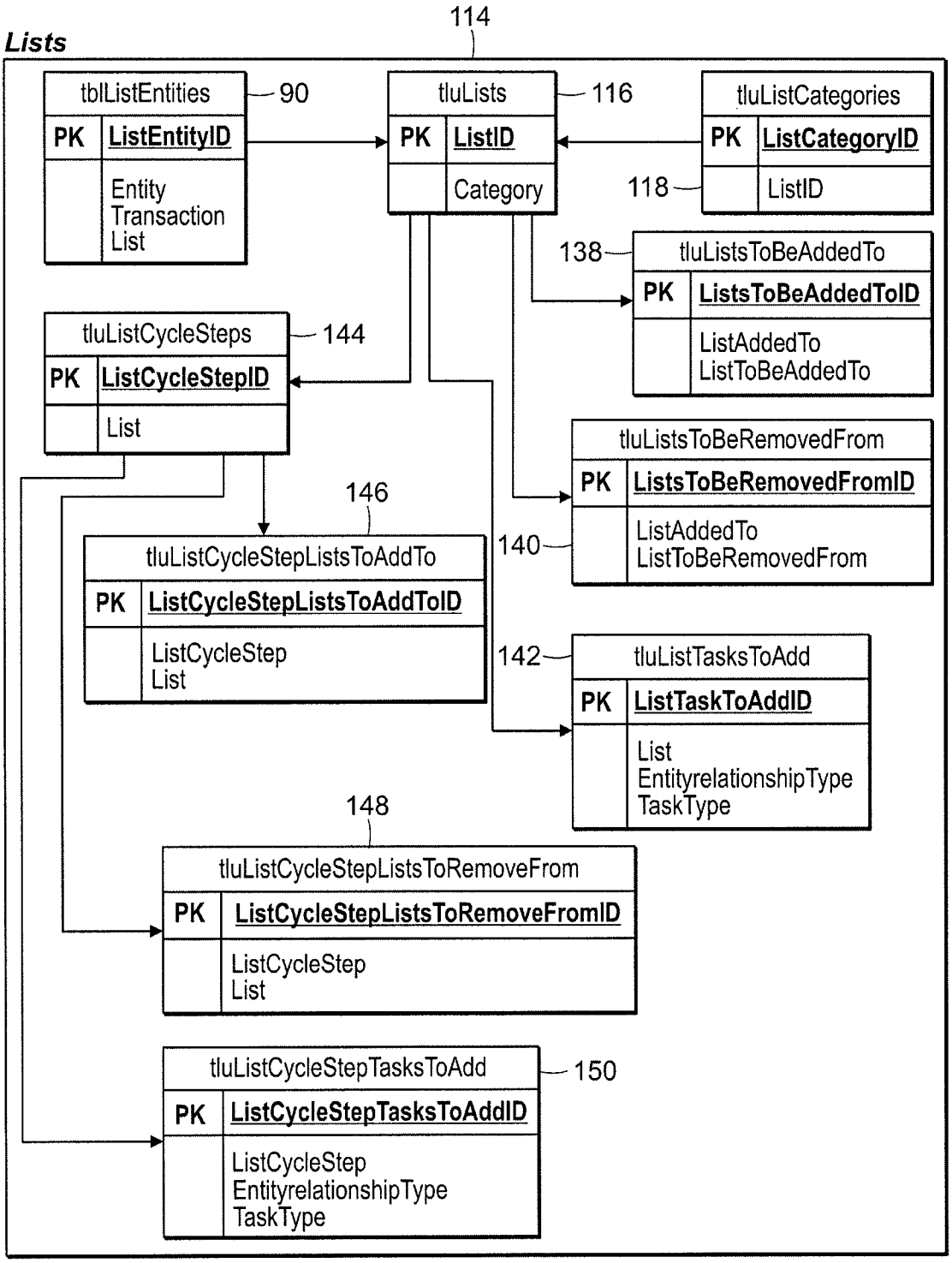

Lists
114
tblListEntities
90
PK
ListEntityID
Entity
Transaction
List
tluLists
116
PK
ListID
Category
tluListCategories
PK
ListCategoryID
118
ListID
138
tluListsToBeAddedTo
PK
ListsToBeAddedToID
ListAddedTo
ListToBeAddedTo
tluListCycleSteps
144
PK
ListCycleStepID
List
tluListsToBeRemovedFrom
PK
ListsToBeRemovedFromID
140
ListAddedTo
ListToBeRemovedFrom
146
tluListCycleStepListsToAddTo
PK
ListCycleStepListsToAddToID
ListCycleStep
List
142
tluListTasksToAdd
PK
ListTaskToAddID
List
EntityrelationshipType
TaskType
148
tluListCycleStepListsToRemoveFrom
PK
ListCycleStepListsToRemoveFromID
ListCycleStep
List
tluListCycleStepTasksToAdd
150
PK
ListCycleStepTasksToAddID
ListCycleStep
EntityrelationshipType
TaskType

FIG. 8

120

FROM THIS

126

124 — Name	Sales Cycle Status
Alice	Suspect
Bobby	Lead
Joe	Suspect
John	Prospect
Mark	Lead
Mary	Lead
Michael	Lead
Paul	Lead
Peter	Prospect
Raymond	Hot Prospect
Rodney	Lead
Samantha	Prospect
Sylvia	Suspect
Tracy	Hot Prospect
Trent	Suspect

FIG. 9A

122

TO THIS

Name —128	Lead —130
Bobby	Bobby
Trent	Paul
Sylvia	Michael
Samantha	Mark
Joe	Mary
Paul	Rodney
Michael	
Tracy	**Suspect** —132
Raymond	Trent
Mark	Sylvia
Mary	Joe
Rodney	Alice
Peter	
John	**Prospect** —134
Alice	Samantha
	Peter
	John
	Hot —136
	Tracy
	Raymond

FIG. 9B

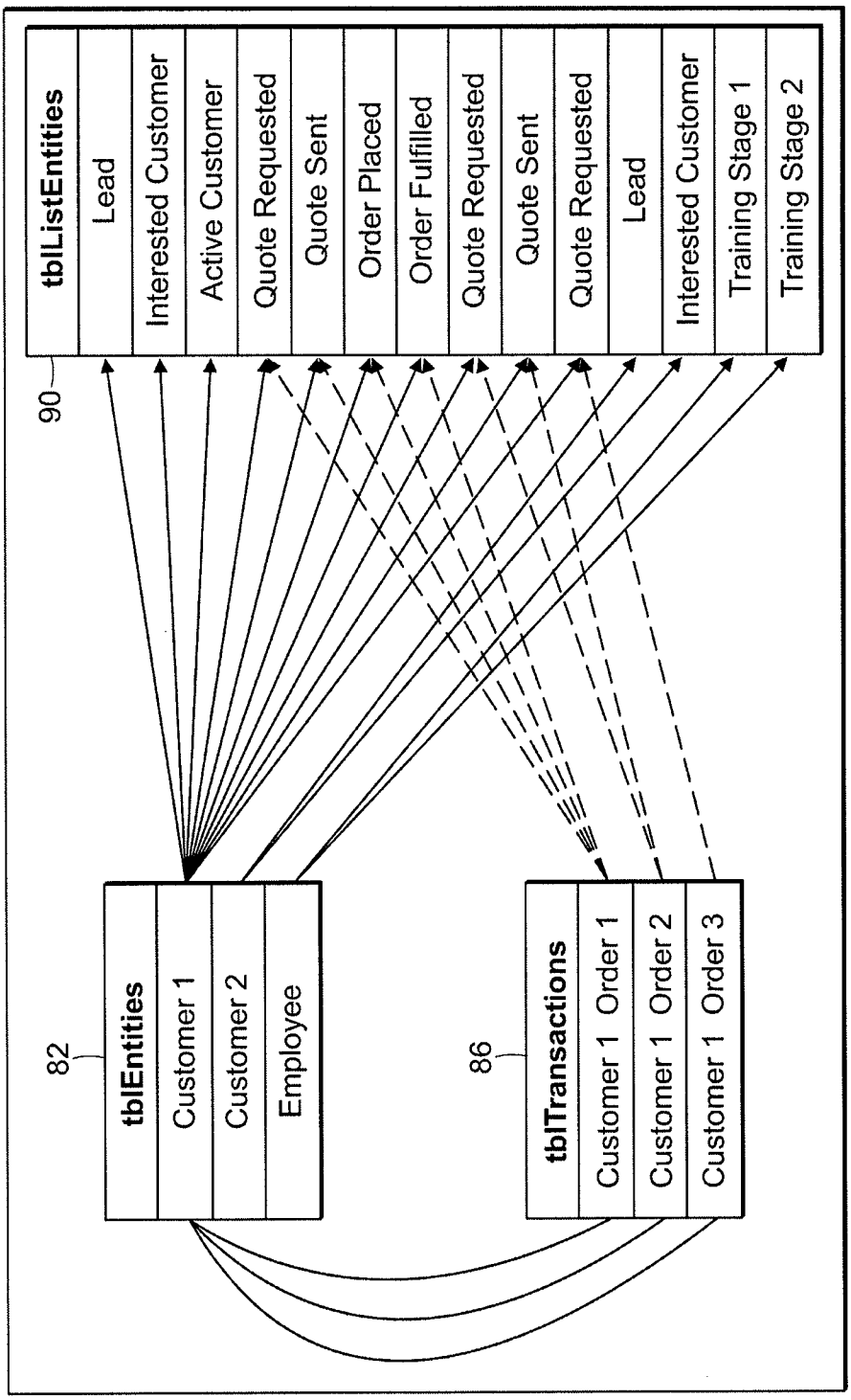

tblListEntities
Lead
Interested Customer
Active Customer
Quote Requested
Quote Sent
Order Placed
Order Fulfilled
Quote Requested
Quote Sent
Quote Requested
Lead
Interested Customer
Training Stage 1
Training Stage 2
90
tblEntities
Customer 1
Customer 2
Employee
82
tblTransactions
Customer 1 Order 1
Customer 1 Order 2
Customer 1 Order 3
86

FIG. 10

Each List can, in turn, trigger other list additions, deletions or actions immediately or after a user-definable amount of time — creating a easily specifiable and virtually limitless eProcess chain reaction.

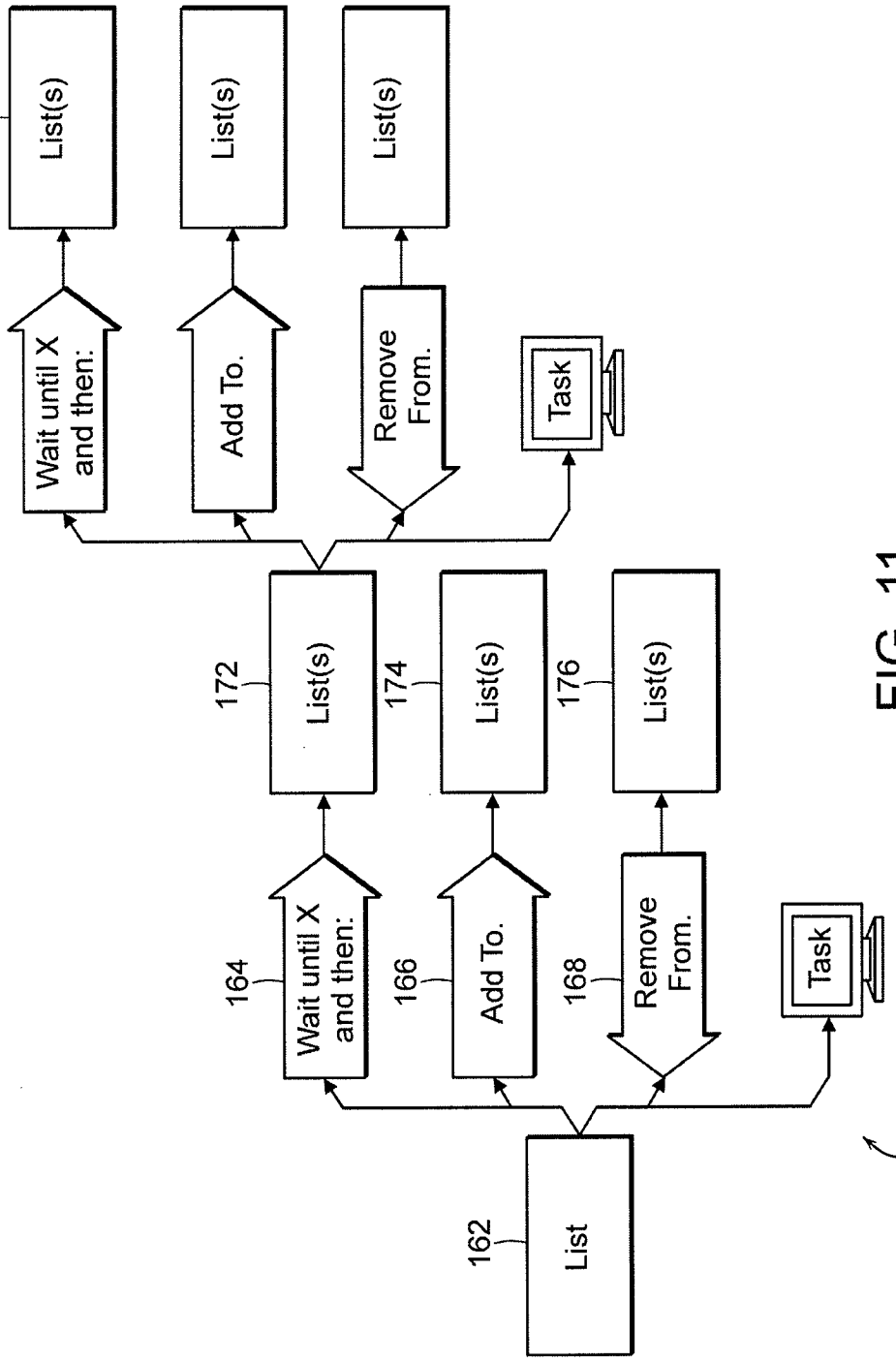


FIG. 11

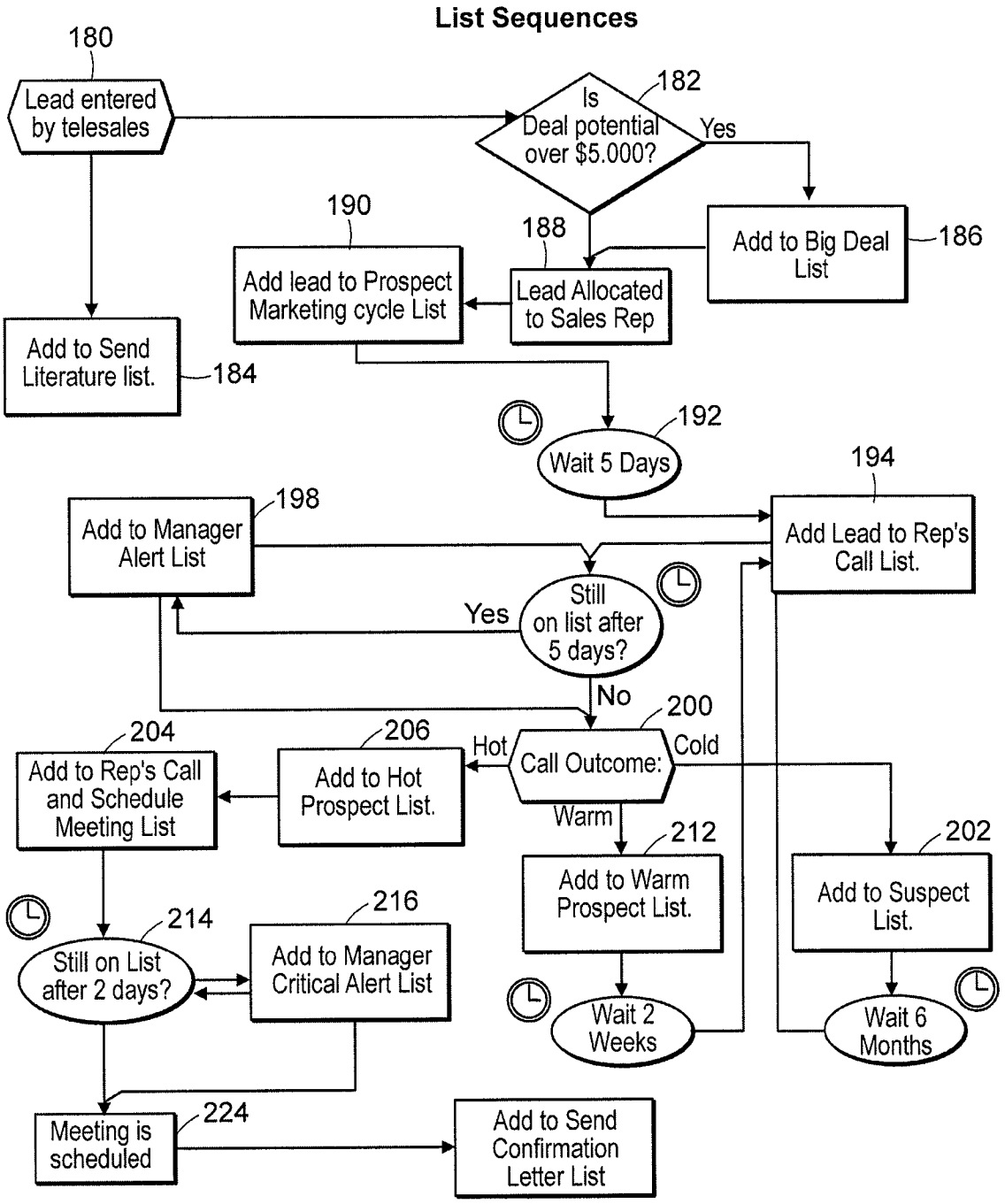
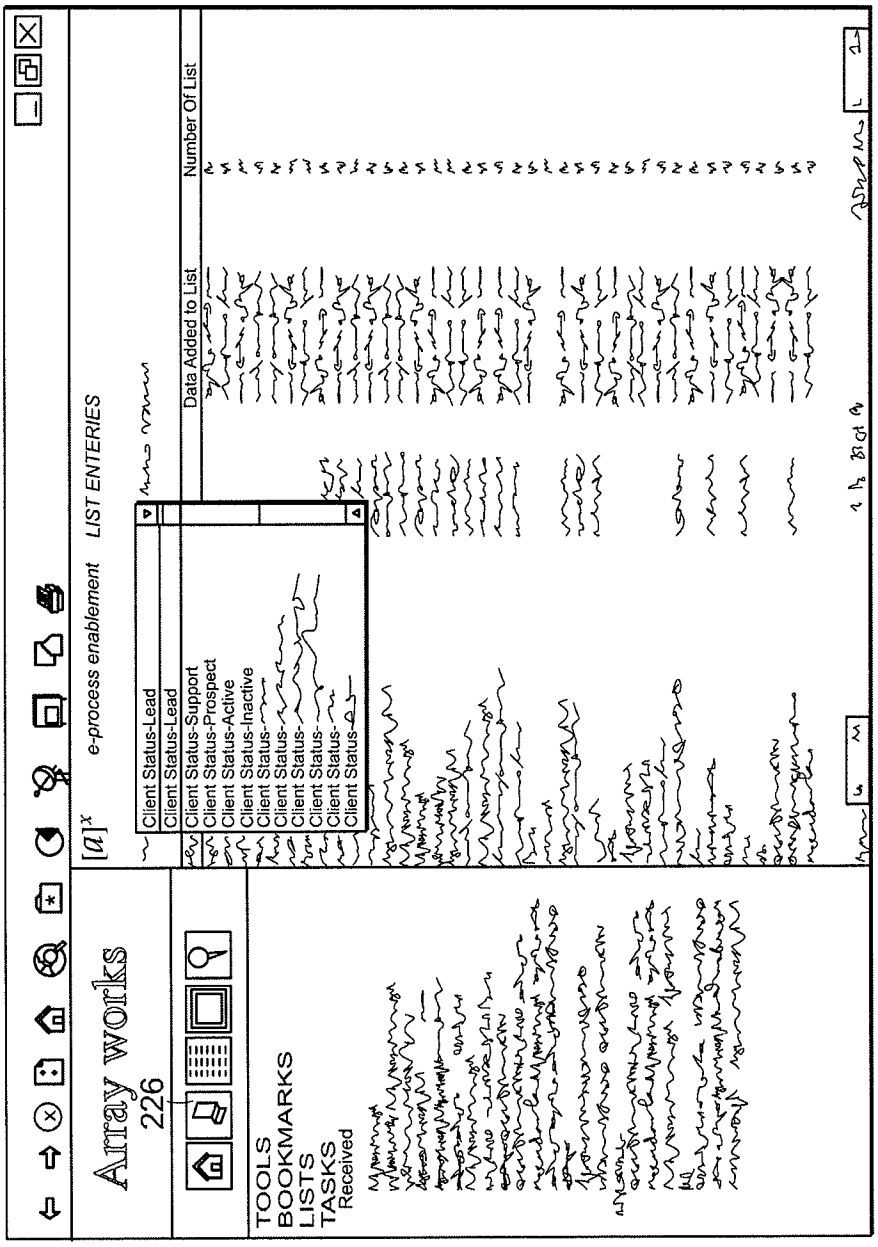

List Sequences
180
Lead entered by telesales
182
Is Deal potential over $5.000?
Yes
Add to Big Deal List
186
188
Lead Allocated to Sales Rep
190
Add lead to Prospect Marketing cycle List
Add to Send Literature list.
184
192
Wait 5 Days
194
Add Lead to Rep's Call List.
198
Add to Manager Alert List
Still on list after 5 days?
Yes
No
200
Call Outcome:
Hot
Cold
Warm
204
Add to Rep's Call and Schedule Meeting List
206
Add to Hot Prospect List.
212
Add to Warm Prospect List.
202
Add to Suspect List.
214
Still on List after 2 days?
216
Add to Manager Critical Alert List
Wait 2 Weeks
Wait 6 Months
224
Meeting is scheduled
Add to Send Confirmation Letter List

FIG. 12


Array works
226
TOOLS
BOOKMARKS
LISTS
TASKS
Received
e-process enablement
LIST ENTERIES
Client Status-Lead
Client Status-Lead
Client Status-Support
Client Status-Prospect
Client Status-Active
Client Status-Inactive
Data Added to List
Number Of List

221

FIG. 13

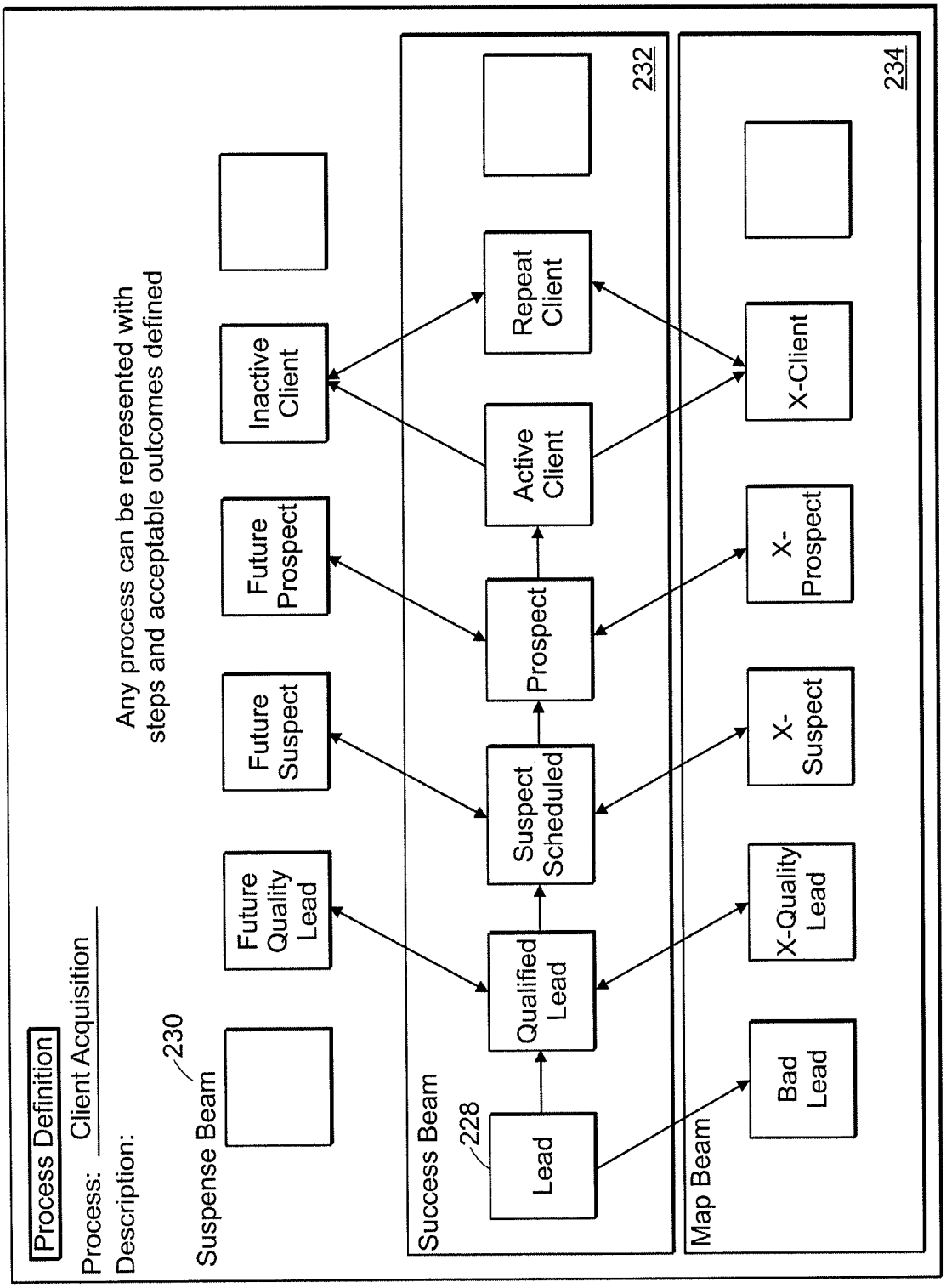

Process Definition
Process: Client Acquisition
Description:
Any process can be represented with steps and acceptable outcomes defined
230
Suspense Beam
Future Quality Lead
Future Suspect
Future Prospect
Inactive Client
Success Beam
228
Lead
Qualified Lead
Suspect Scheduled
Prospect
Active Client
Repeat Client
232
Map Beam
Bad Lead
X-Quality Lead
X-Suspect
X-Prospect
X-Client
234

FIG. 14

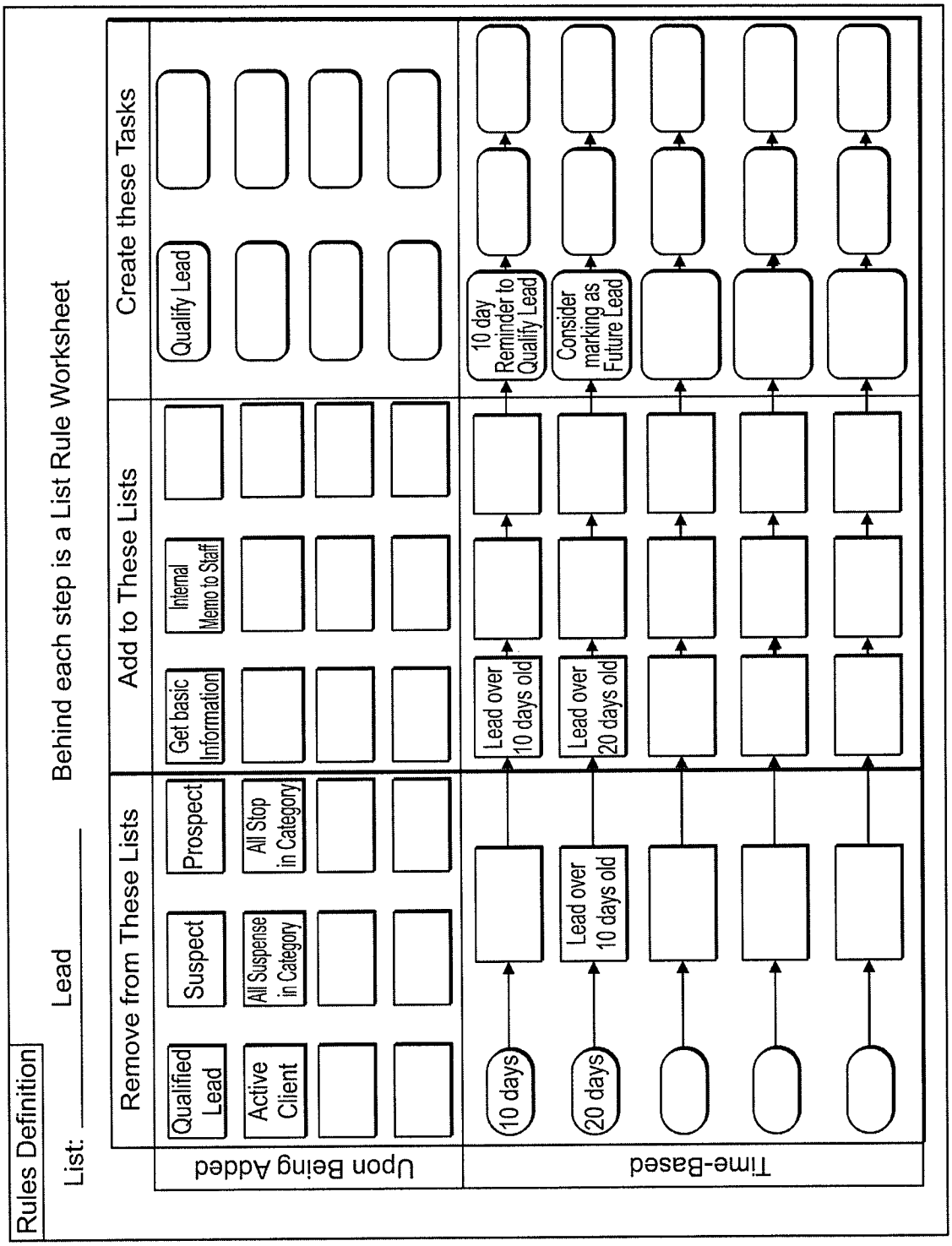

Rules Definition
List: Lead
Behind each step is a List Rule Worksheet
Upon Being Added
Remove from These Lists
Qualified Lead
Active Client
Suspect
All Suspense in Category
Prospect
All Stop in Category
Add to These Lists
Get basic Information
Internal Memo to Staff
Create these Tasks
Qualify Lead
Time-Based
10 days
20 days
Lead over 10 days old
Lead over 10 days old
Lead over 20 days old
10 day Reminder to Qualify Lead
Consider marking as Future Lead

FIG. 15

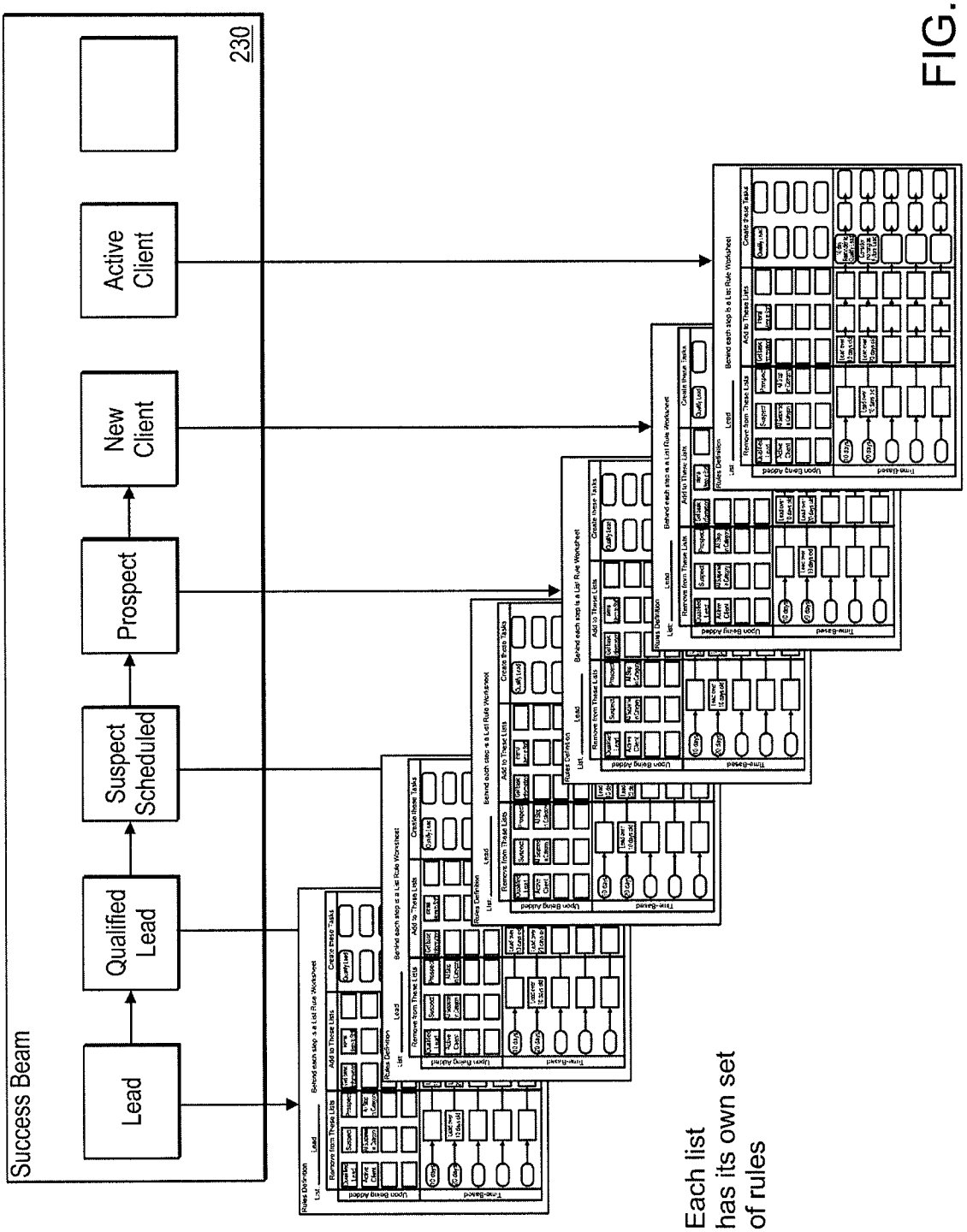

Success Beam
230
Lead
Qualified Lead
Suspect Scheduled
Prospect
New Client
Active Client
Each list has its own set of rules

FIG. 16A

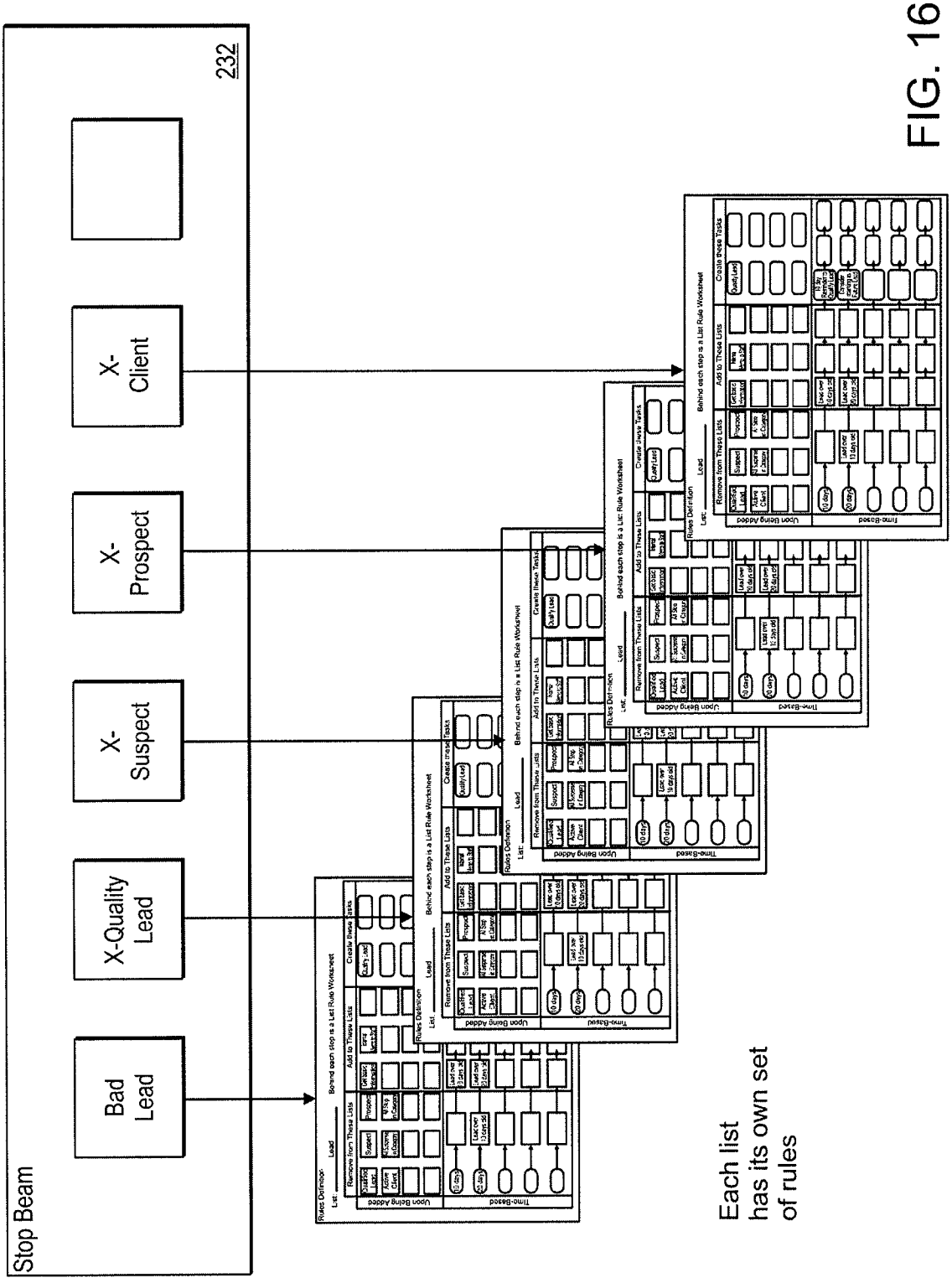

Stop Beam
232
Bad Lead
X-Quality Lead
X-Suspect
X-Prospect
X-Client
Each list has its own set of rules

FIG. 16B

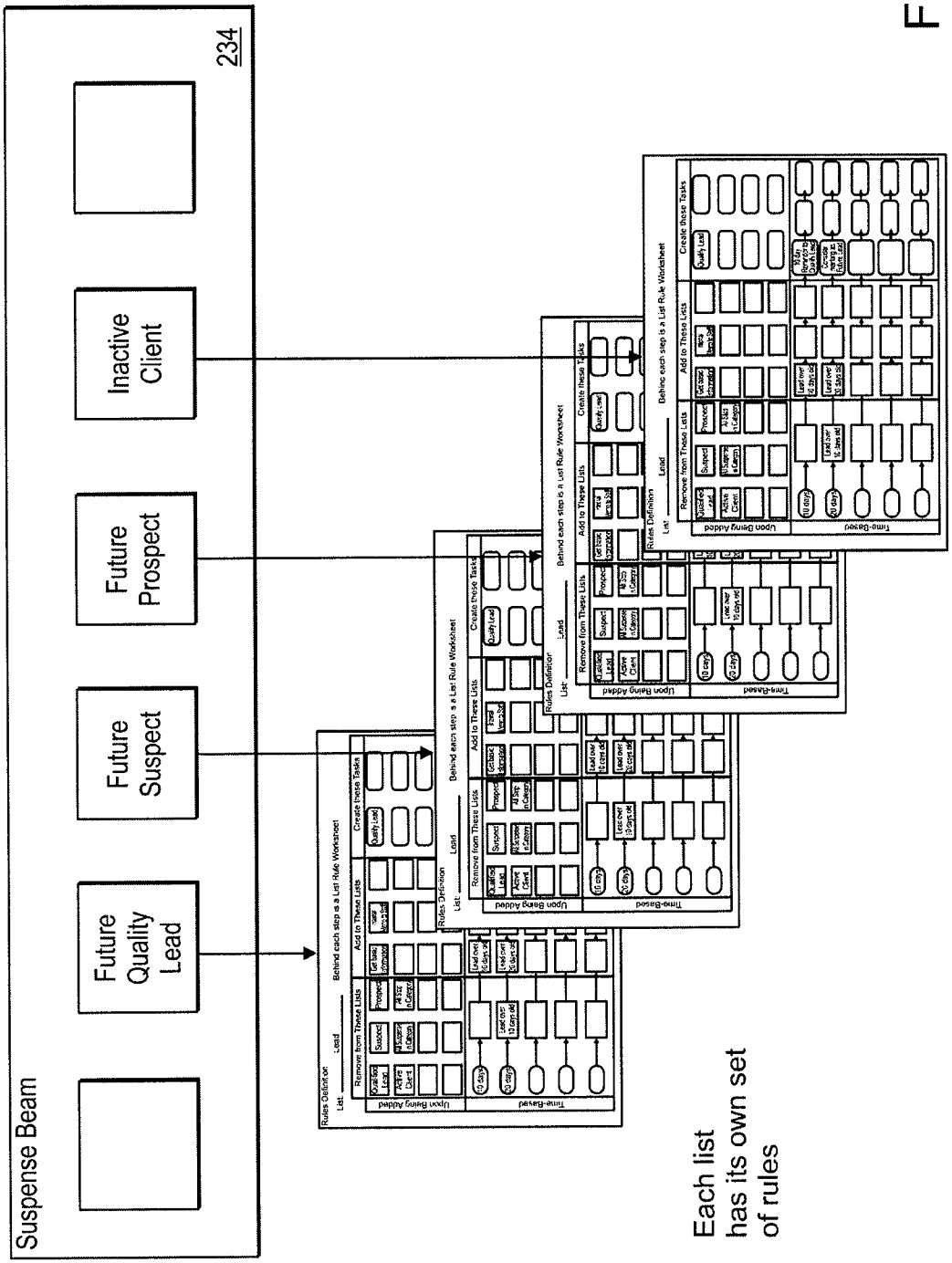

Suspense Beam
Future Quality Lead
Future Suspect
Future Prospect
Inactive Client
234
Each list has its own set of rules

FIG. 16C

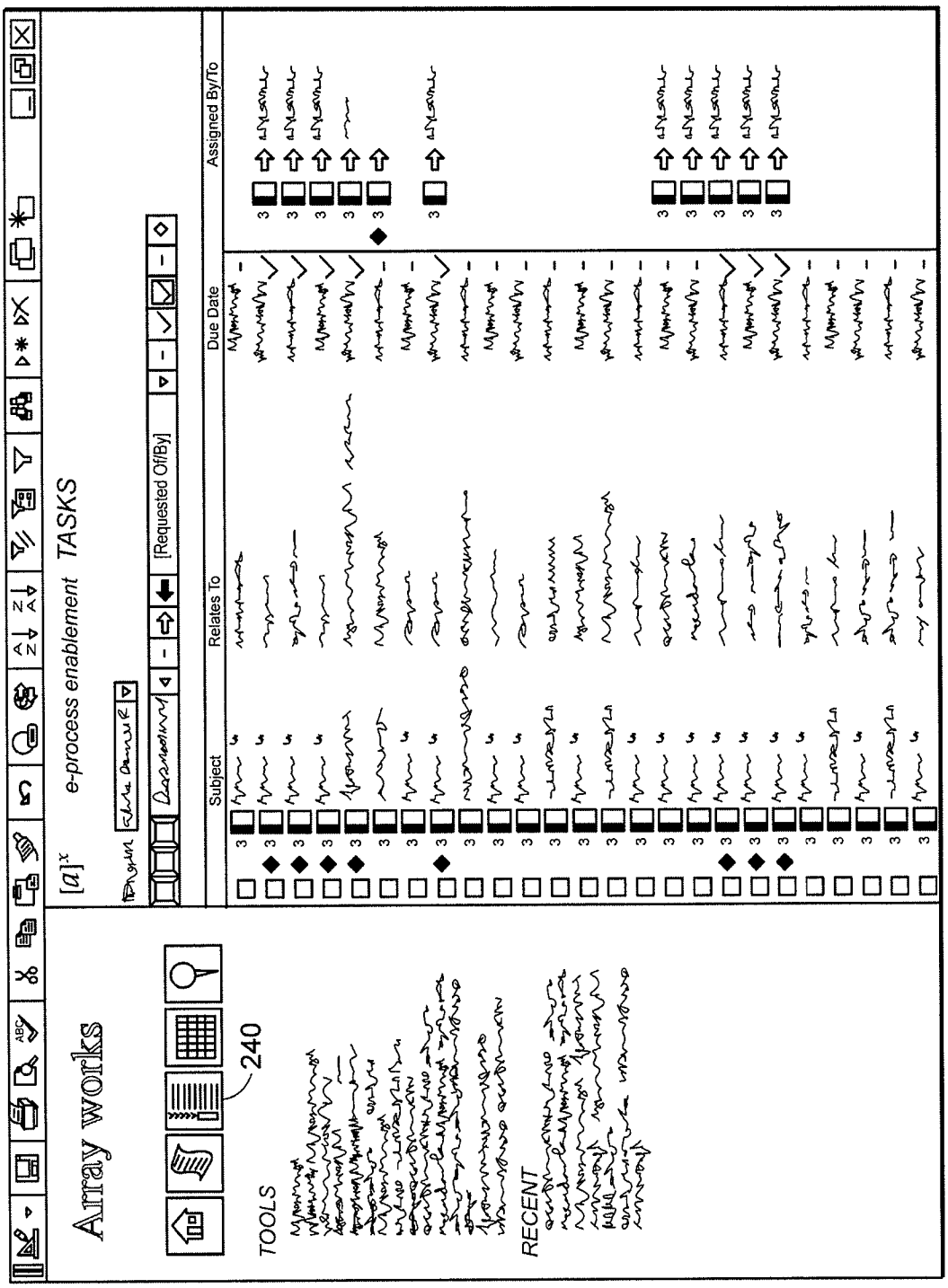

Array works
e-process enablement TASKS
240
TOOLS
RECENT
Subject
Relates To
Due Date
Assigned By/To
[Requested Of/By]

FIG. 17A

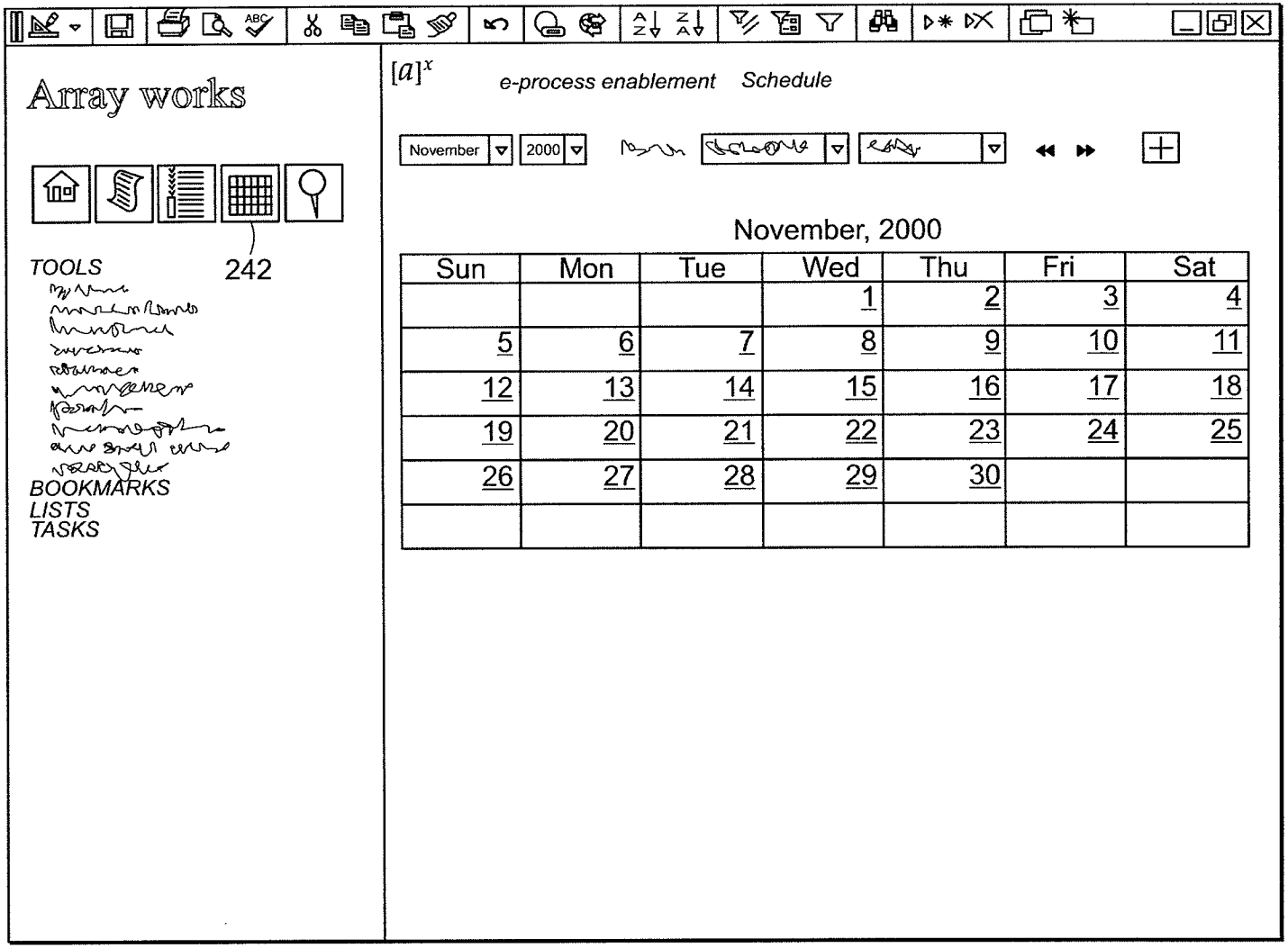

Array works
TOOLS
242
BOOKMARKS
LISTS
TASKS
[a]x
e-process enablement
Schedule
November
2000
November, 2000
Sun Mon Tue Wed Thu Fri Sat
1 2 3 4
5 6 7 8 9 10 11
12 13 14 15 16 17 18
19 20 21 22 23 24 25
26 27 28 29 30

FIG. 17B

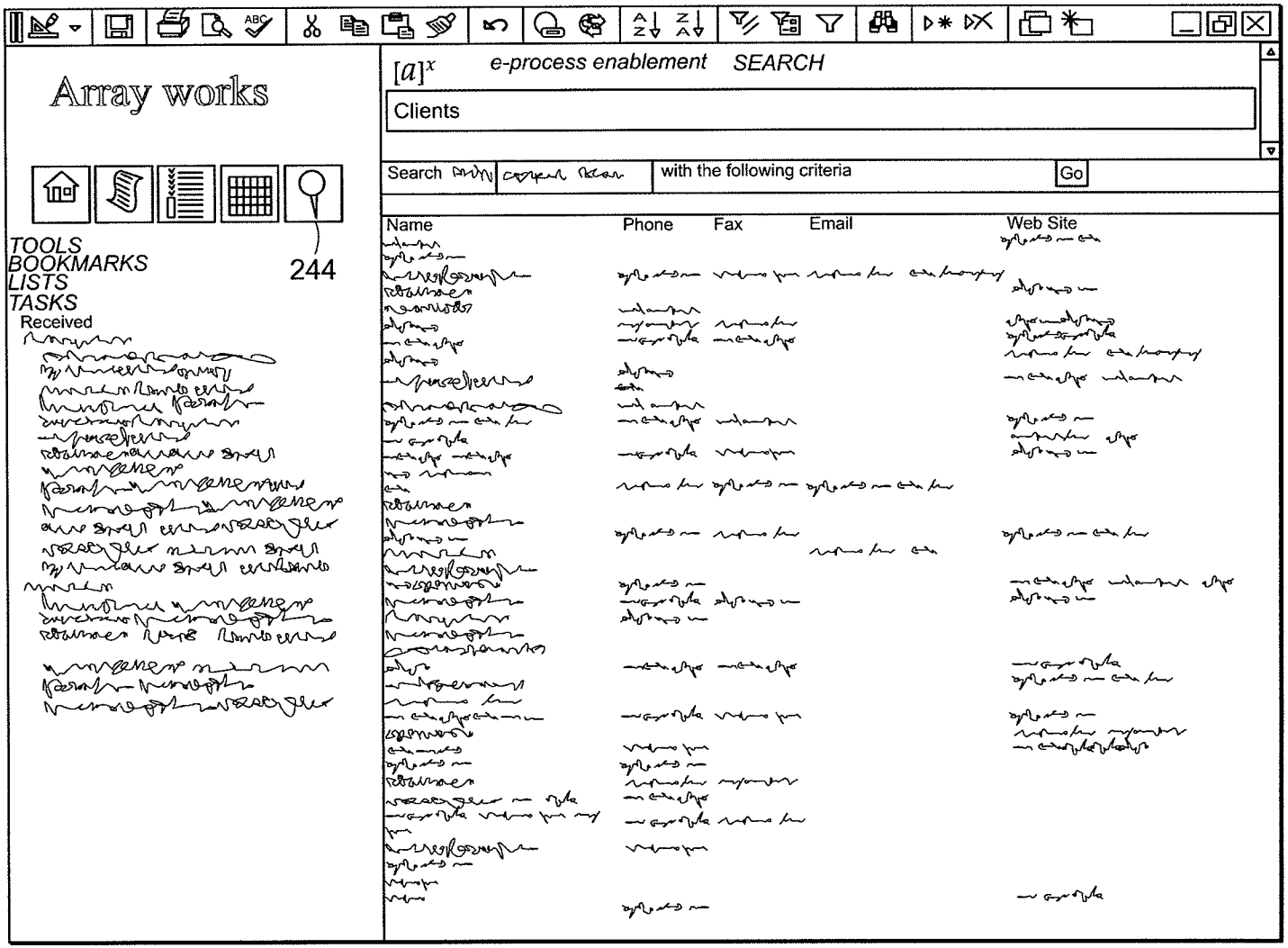

Array works
[a]x e-process enablement SEARCH
Clients
Search
with the following criteria
Go
Name
Phone
Fax
Email
Web Site
TOOLS
BOOKMARKS
LISTS
TASKS
Received
244

FIG. 17C

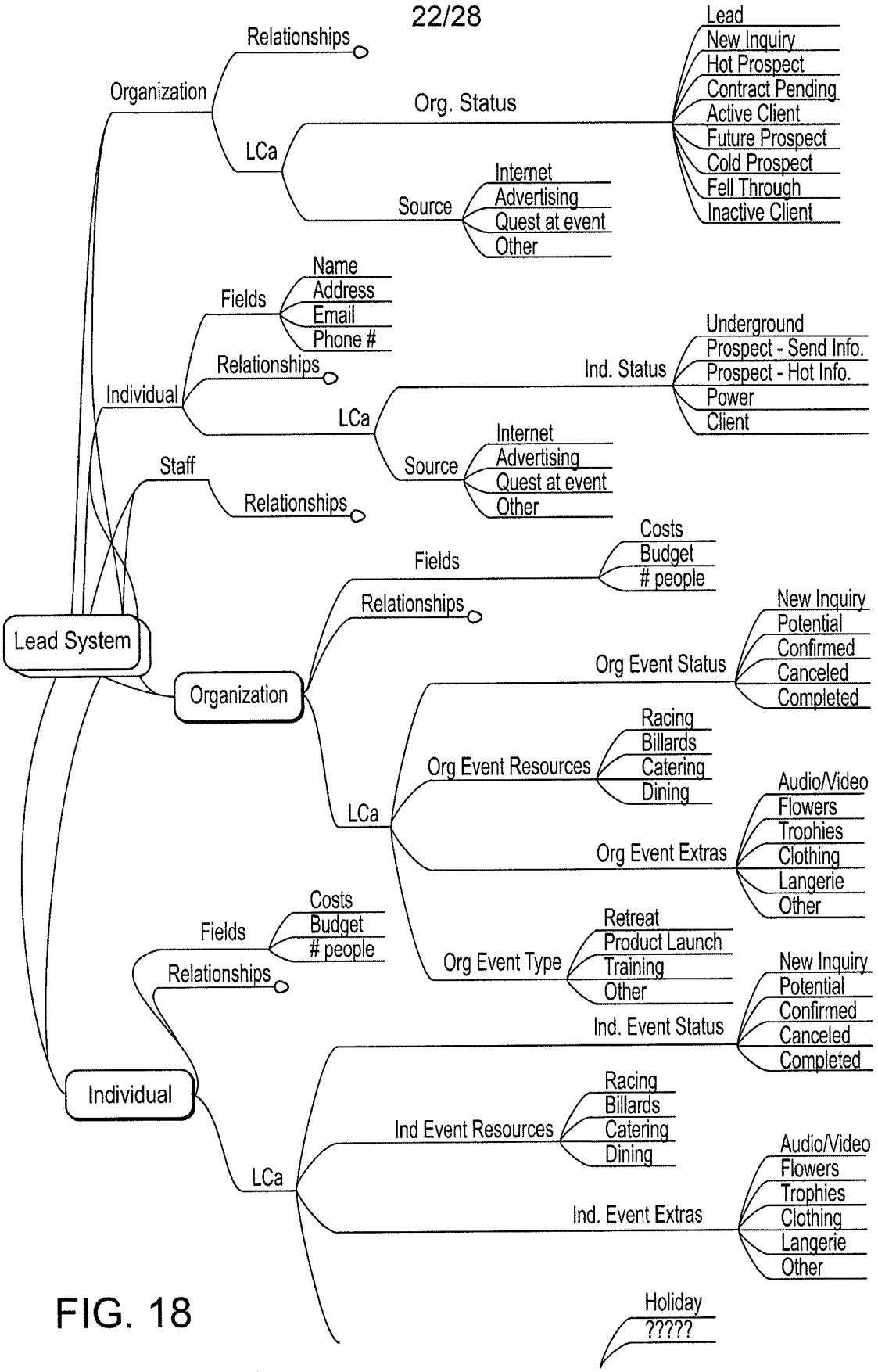

Lead System
Organization
Relationships
LCa
Org. Status
Lead
New Inquiry
Hot Prospect
Contract Pending
Active Client
Future Prospect
Cold Prospect
Fell Through
Inactive Client
Source
Internet
Advertising
Quest at event
Other
Individual
Fields
Name
Address
Email
Phone #
Relationships
LCa
Ind. Status
Underground
Prospect - Send Info.
Prospect - Hot Info.
Power
Client
Source
Internet
Advertising
Quest at event
Other
Staff
Relationships
Organization
Fields
Costs
Budget
people
Relationships
Org Event Status
New Inquiry
Potential
Confirmed
Canceled
Completed
LCa
Org Event Resources
Racing
Billards
Catering
Dining
Org Event Extras
Audio/Video
Flowers
Trophies
Clothing
Langerie
Other
Org Event Type
Retreat
Product Launch
Training
Other
Individual
Fields
Costs
Budget
people
Relationships
Ind. Event Status
New Inquiry
Potential
Confirmed
Canceled
Completed
LCa
Ind Event Resources
Racing
Billards
Catering
Dining
Ind. Event Extras
Audio/Video
Flowers
Trophies
Clothing
Langerie
Other
Holiday
?????

FIG. 18

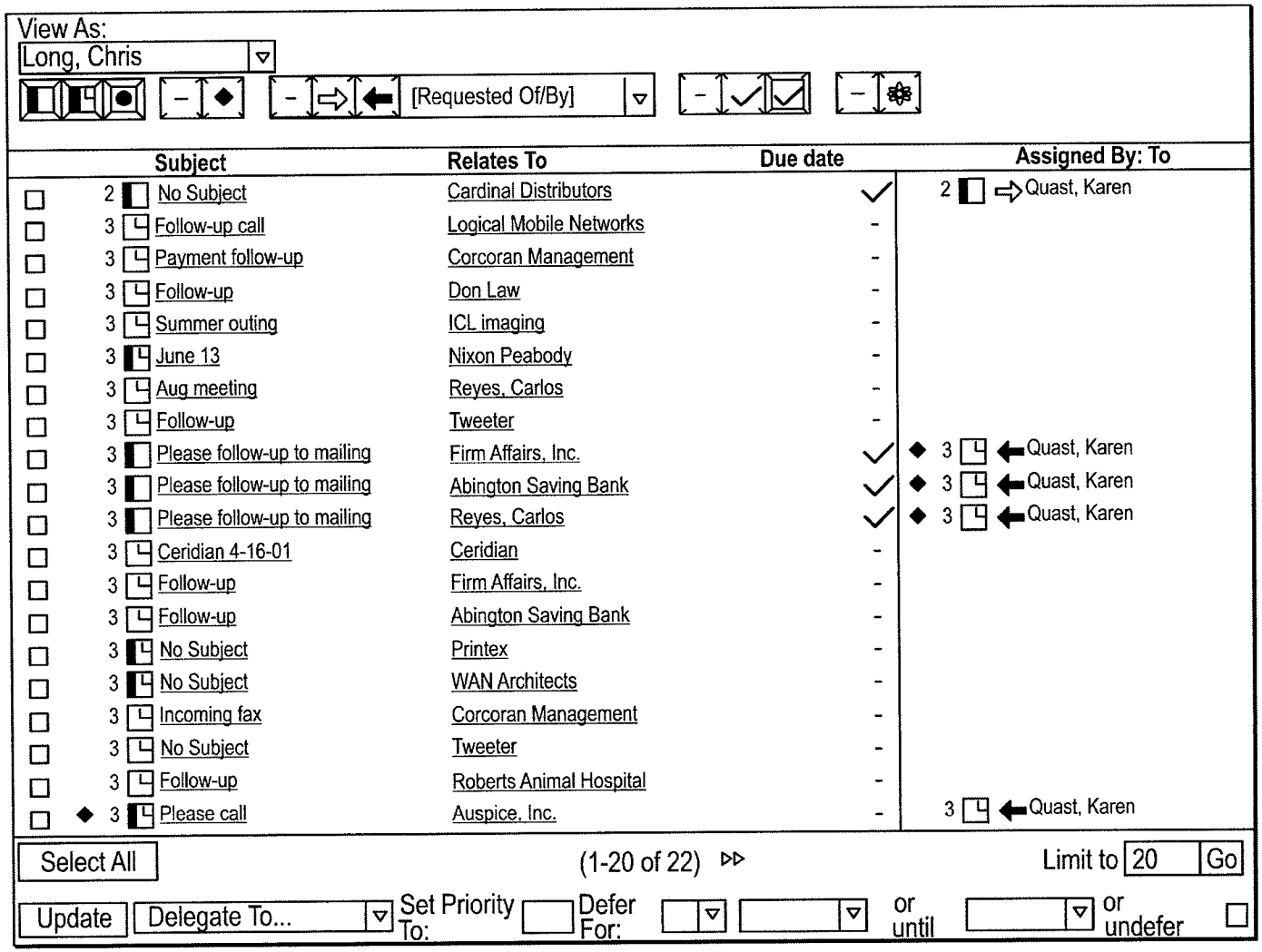

View As:
Long, Chris
[Requested Of/By]
Subject
Relates To
Due date
Assigned By: To
2 No Subject
Cardinal Distributors
2 Quast, Karen
3 Follow-up call
Logical Mobile Networks
3 Payment follow-up
Corcoran Management
3 Follow-up
Don Law
3 Summer outing
ICL imaging
3 June 13
Nixon Peabody
3 Aug meeting
Reyes, Carlos
3 Follow-up
Tweeter
3 Please follow-up to mailing
Firm Affairs, Inc.
3 Quast, Karen
3 Please follow-up to mailing
Abington Saving Bank
3 Quast, Karen
3 Please follow-up to mailing
Reyes, Carlos
3 Quast, Karen
3 Ceridian 4-16-01
Ceridian
3 Follow-up
Firm Affairs, Inc.
3 Follow-up
Abington Saving Bank
3 No Subject
Printex
3 No Subject
WAN Architects
3 Incoming fax
Corcoran Management
3 No Subject
Tweeter
3 Follow-up
Roberts Animal Hospital
3 Please call
Auspice, Inc.
3 Quast, Karen
Select All
(1-20 of 22)
Limit to 20 Go
Update
Delegate To...
Set Priority To:
Defer For:
or until
or undefer

FIG. 19A

ON
OFF
Active (on by default)
Active - deferred until time has expired (on by default)
Deferred until future date/time (off by default)
Show items that have been read (on by default)
Show items that haven't been read (on by default)
Show Self-appointed items (on by default)
Show Delegated items (on by default)
Show Received items (on by default)
Show open items (on by default)
Show items Marked-for-sign-off (on by default)
Show items Signed-off (off by default)
Show items that have been read by Requested Of/By (on by default)
Show items that have been read by Requested Of/By (on by default)

FIG. 19B

Create task and link it to current page
Create another item (type of item depends on which page icon appears)
Create current page to printable format
Save current changes
Download current entity information to Microsoft Outlook
Create an activity record an associate it to current page/entry
If view is anchored, then move to previous item
If view is anchored, then move to next item

FIG. 19C

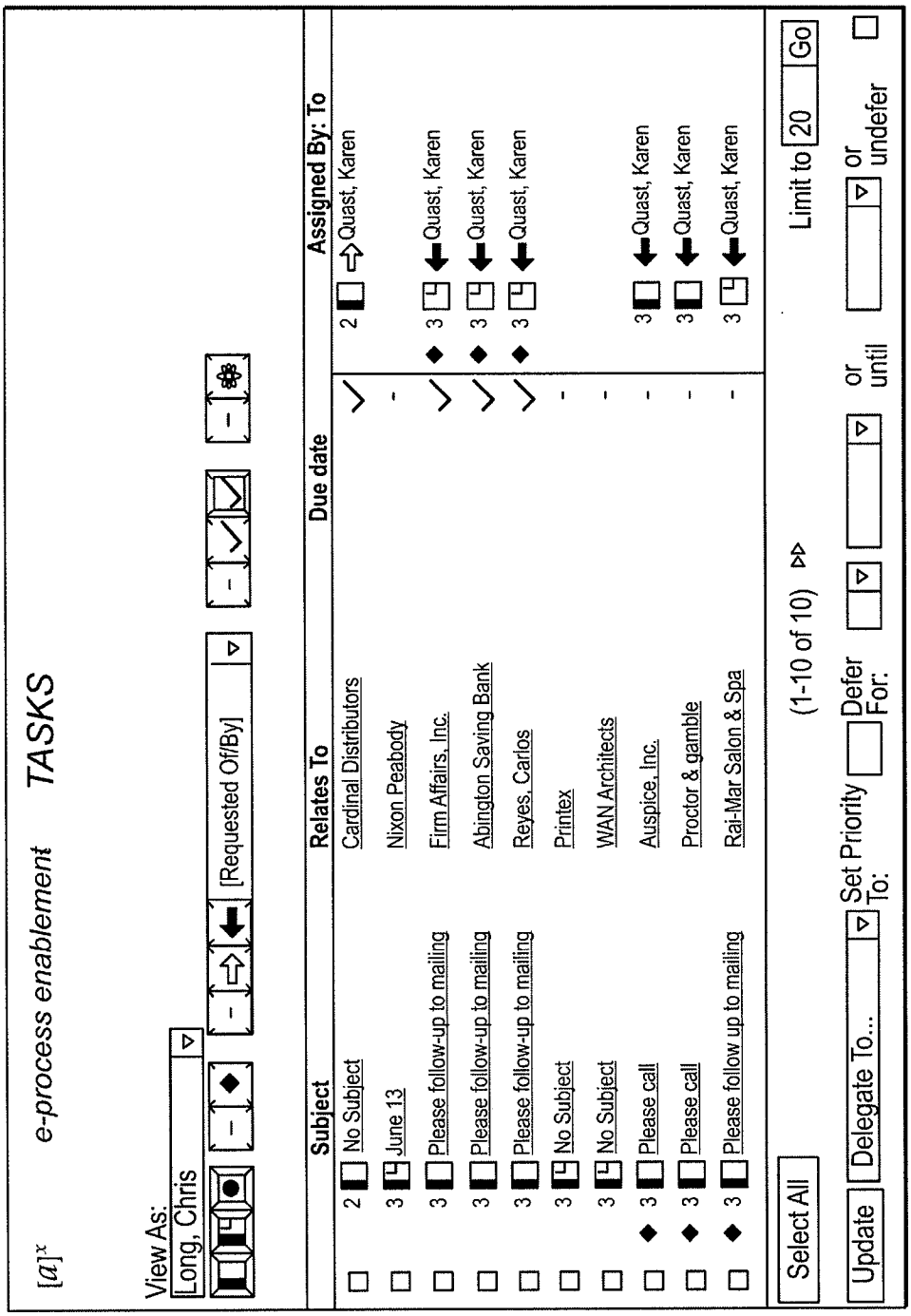

[a]x
e-process enablement
TASKS
View As:
Long, Chris
[Requested Of/By]
Subject
Relates To
Due date
Assigned By: To
2 No Subject
Cardinal Distributors
2 Quast, Karen
3 June 13
Nixon Peabody
3 Please follow-up to mailing
Firm Affairs, Inc.
3 Quast, Karen
3 Please follow-up to mailing
Abington Saving Bank
3 Quast, Karen
3 Please follow-up to mailing
Reyes, Carlos
3 Quast, Karen
3 No Subject
Printex
3 No Subject
WAN Architects
3 Please call
Auspice, Inc.
3 Quast, Karen
3 Please call
Proctor & gamble
3 Quast, Karen
3 Please follow up to mailing
Rai-Mar Salon & Spa
3 Quast, Karen
Select All
(1-10 of 10)
Limit to 20 Go
Update
Delegate To...
Set Priority To:
Defer For:
or until
or undefer

FIG. 20

Assignet To: Piasecki, Richard By Quast, Karen

Priority: 3 (Assigned To Priority - 3)

Description: 25 - 100 people Date undetermined

Due Date:

[Goto Page]

Interested Parties

Comments and Actions

Date	By	Comment
03/01/01 04:34 PM	Piasecki, Richard	The task was marked for sign-off on 3/1/2001 4:34:25 PM
03/01/01 04:34 PM	Piasecki, Richard	End of the month over, sales meeting on monday will cell
02/26/01 07:40 PM	Quast, Karen	The task was reactivated on 2/26/2001 7:40:11 PM
02/26/01 04:14 PM	Piasecki, Richard	The task was marked for sign-off on 2/26/2001 4:14:13 PM
02/26/01 04:14 PM	Piasecki, Richard	Site visit (?) with Pete Cronin Thurs PM
02/14/01 01:24 PM	Quast, Karen	Please give me status on this RJ wants to follow this mailing
02/14/01 01:24 PM	Quast, Karen	The task was reactivated on 2/14/2001 1:24:04 PM
02/14/01 01:00 PM	Piasecki, Richard	The task was marked for sign-off on2/14/2001 1:00:25 PM
02/14/01 01:00 PM	Piasecki, Richard	Invited him in for a SV this week, Fri no confirmation yet
02/14/01 11:39 AM	Quast, Karen	Is site visit scheduled?
02/14/01 11:39 AM	Quast, Karen	The task was reactivated on 2/14/2001 11:39:12 AM
02/14/01 09:33 AM	Piasecki, Richard	May come in for a site visit 2-16
02/09/01 10:42 AM	Piasecki, Richard	The task was marked for sign-off on 2/9/2001 10:42:04 AM
02/09/01 10:42 AM	Piasecki, Richard	Greet Lead from mailer, will come in for site visit, incentive event in MAR
02/08/01 10:29 PM	Quast, Karen	The task was delegated

Comment: Add Comment

Subdelegated Tasks

P	SOS	URR	URT	Subject	Related To	Assigned To	Due Date

FIG. 21

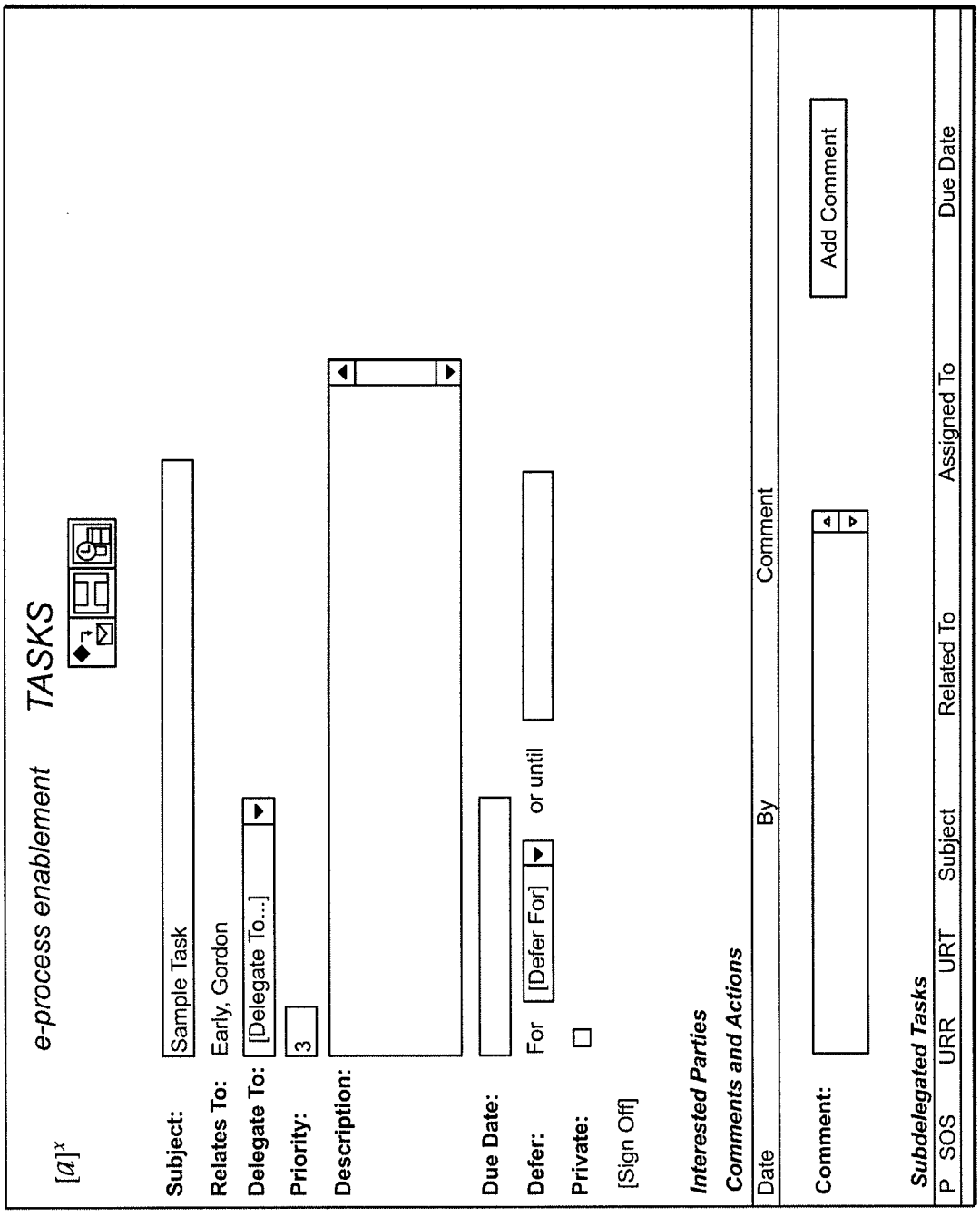

[a]x
e-process enablement
TASKS
Subject:
Sample Task
Relates To:
Early, Gordon
Delegate To:
[Delegate To...]
Priority:
3
Description:
Due Date:
Defer:
For
[Defer For]
or until
Private:
[Sign Off]
Interested Parties
Comments and Actions
Date
By
Comment
Comment:
Add Comment
Subdelegated Tasks
P
SOS
URR
URT
Subject
Related To
Assigned To
Due Date

FIG. 22